



# ***Federal Update***

**Kay Jacks**

**Jeff Baker**

**Dan Madzellan**



# **Agenda**

## ***EAC Federal Update***

- **Welcome and Introduction**
- **Getting Aid Right at Point of Application**
- **Getting Aid Right – Origination, Disbursement and Reporting**
- **Getting Aid Right - Legal and Policy Issues**
- **Things to Remember**



# Agenda

## *EAC Federal Update*

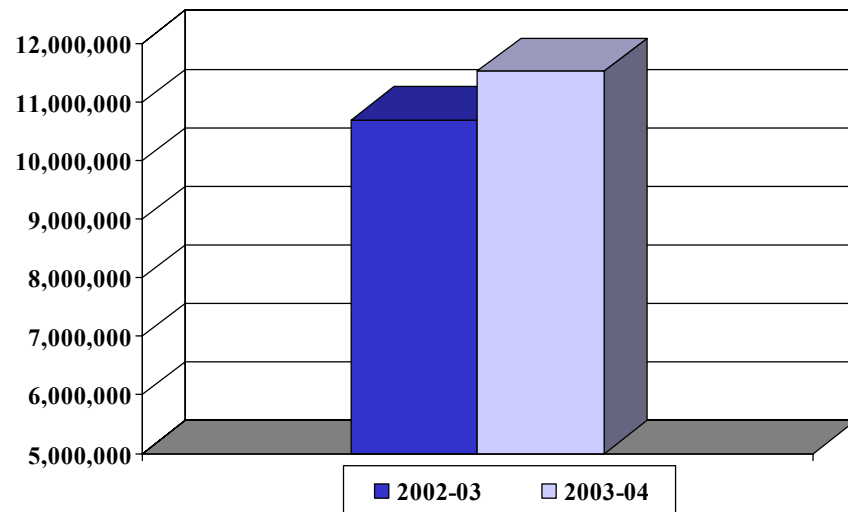
- Welcome and Introduction
- **Getting Aid Right at Point of Application**
- Getting Aid Right – Origination, Disbursement and Reporting
- Getting Aid Right - Legal and Policy Issues
- Things to Remember



# Application Processing Statistics:

## Application Volume 2002-03 and 2003-04

- **10,692,665**  
2002-03 FAFSAs  
processed as of  
November 17, 2002  
(week 46)
- **11,533,158**  
2003-04 FAFSAs  
processed as of  
November 16, 2003  
(week 46)



**That's an 7.8% increase!**



# Application Processing Statistics:

## FAFSA on the Web Volume

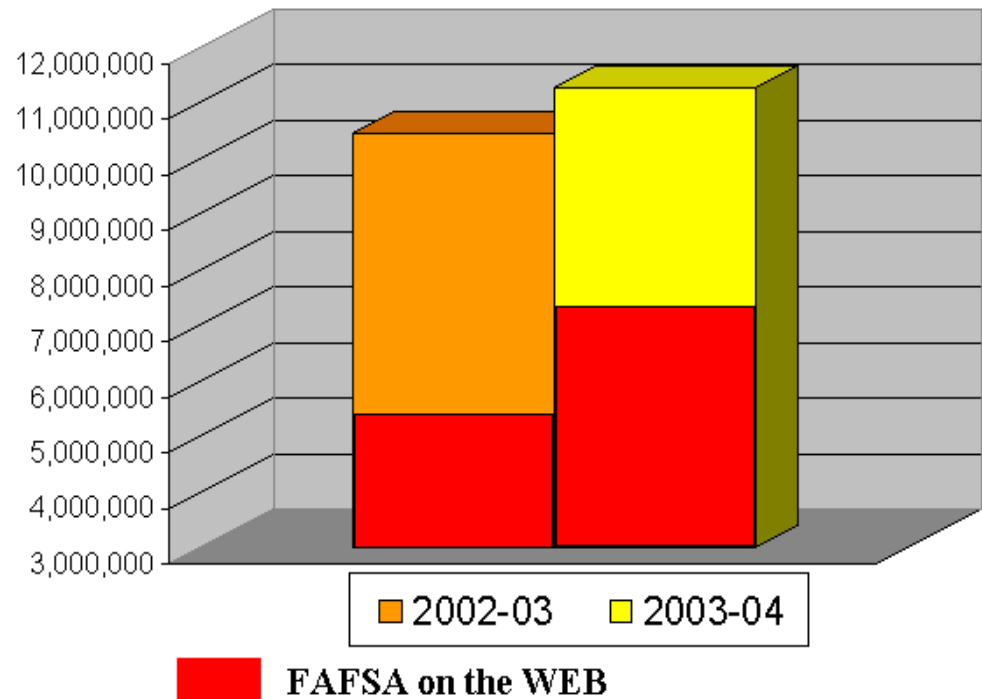
### 2002-03 and 2003-04

- **4,781,810**

2002-03 FAFSA on the Web Apps processed as of October 27, 2002 (week 43)

- **6,773,099**

2003-04 FAFSA on the Web Apps processed as of October 26, 2003 (week 43)



**That's a 41% increase!**



# CPS Changes

## Multi-Year Applicant Database

### *CPS re-engineered to:*

- **Perform cross-year edits to detect possible inconsistencies across application years**
- **Produce warning comments if edit is hit**
  - Number of Family Members or Number in College
  - Parents' Total Income
  - Parents' Taxes Paid



# The 2004-05 Application Process: *ISIR Datamart*

## “Pushed” ISIRs

- Certain ISIRs automatically “pushed” regardless of option selected by institution
  - EFC changes
  - SAR C Code changes
  - System-generated transactions –
    - NSLDS post-screening
    - INS automated secondary confirmation
    - Reprocessing





# The 2004-05 Application Process: *ISIR Datamart*

## “Must See” ISIRs

- Schools must look at all “pushed” ISIRs
- Schools must request ISIRs for all enrolled students



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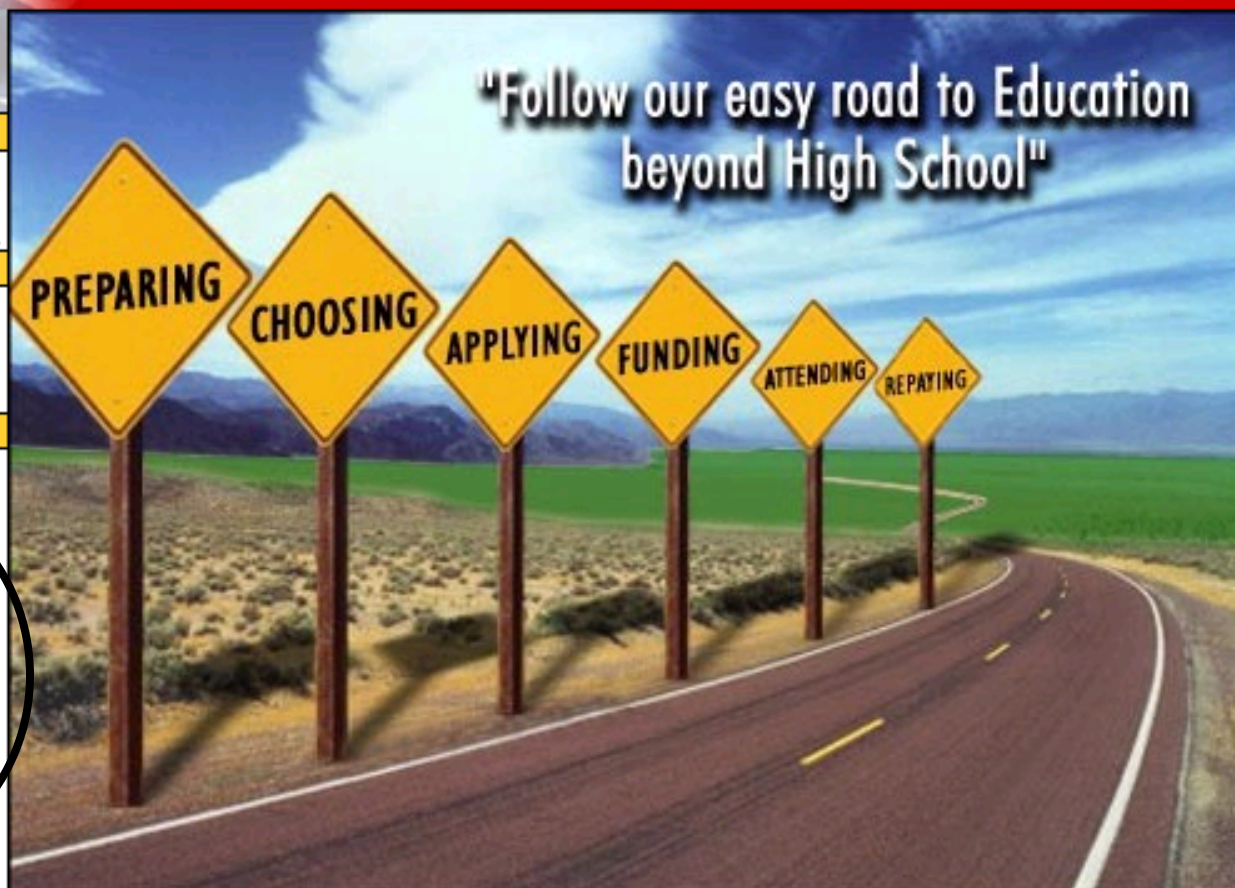
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## College Savings Calculator :: Screen 1 of 3

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## College Costs

Years to college:  ##Planned number of years in college:  ##

Fees:

## Choose from the National Average

College	In-state (Fees)	Out-of-state (Fees)
Two-Year Public	<input checked="" type="radio"/> \$10458	<input type="radio"/> \$10458
Two-Year Private	<input type="radio"/> \$17837	<input type="radio"/> \$17837
Four-Year Public	<input type="radio"/> \$12841	<input type="radio"/> \$19188
Four-Year Private	<input type="radio"/> \$27677	<input type="radio"/> \$27677

Current annual cost: \$ Estimated total future cost: \$ 

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**College Savings**

Amount of current savings: \$

Expected rate of return on savings investment:  %

Future value of current savings (in 3 years): \$

Additional funds required to meet college costs: \$

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**FAFSA****College Savings Calculator :: Screen 3 of 3**

When it comes to planning your college education, the cost of attending college should not be your main concern. Do not let cost be the only reason for choosing one institution over another.

Unlike other costly purchases, you can and likely will get help paying for college. This help is typically made up of grants, scholarships, and loans. There is a lot of financial aid available — tens of billions of dollars go out every year — and some of that could be yours.

The FSA Students Portal's Financial Aid Wizard allows you to plan out, in seven easy steps, your entire financial aid packages online! Notice we said "packages" — our wizard will help you find and calculate virtually everything you need for any and all schools you're interested in. It will show you the deadlines for filing financial aid applications for the colleges you select, walk you through scholarship searches, help you estimate your expected family contribution and federal aid, and provide you a tool to interpret and analyze your financial aid award letters.

To use the wizard to your maximum benefit, we recommend you go through the steps in order, starting with [Step 1, Estimate Costs](#).

**Results**

Required investment amount (annual): \$6,659.83

Required investment amount (monthly): \$554.99

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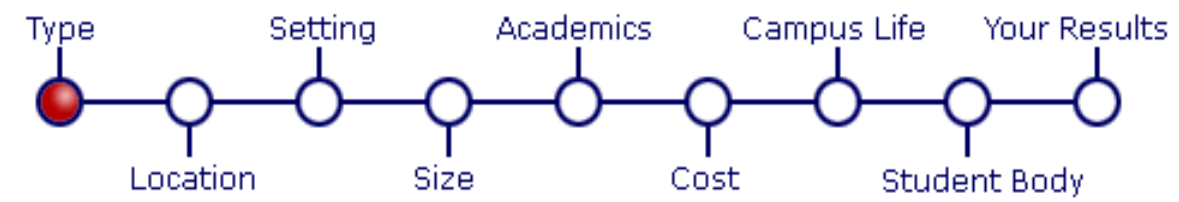
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## College Finder



### Type of College

What type of college would you like to attend?

Would you prefer a public or private college?

How important is your selection?

☐ No preference
 ☐ Somewhat important
 ☐ Important
 ☐ Required

### Switch Modes

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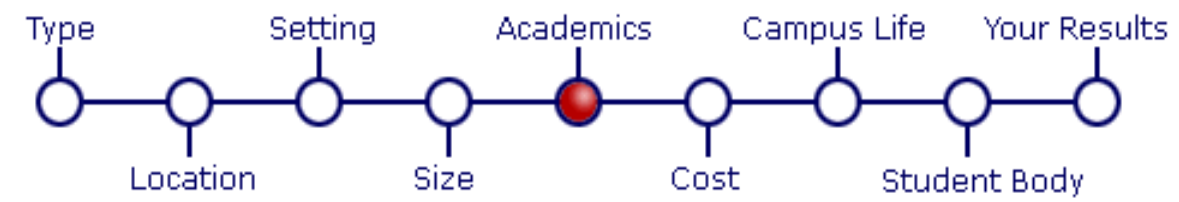
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## College Finder



### Academics

Select up to three majors in which you are interested:

Major 1:  [find](#)

Major 2:  [find](#)

Major 3:  [find](#)

I am interested in the colleges that accept a majority of students who apply with an average GPA within the following range:

I am interested in the colleges that accept a majority of students who apply with an average ACT score within the following range:

**Switch Modes**

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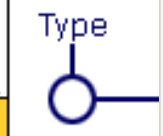
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College

Type



Academic

Select an academic level

**Student Aid on the Web - Microsoft Internet Explorer provided by US Department of Education**

**FSA**

**Major/Program Selection**

Select a category:  
 Health Professions and Related Sciences **GO**

Select a major:  
 Select One

- naturopathic medicine
- nuclear medical technology/technician
- nurse assistant/aide
- nursing (R.N. training)**
- nursing administration (post-R.N.)
- nursing anesthetist (post-R.N.)
- nursing midwifery (post-R.N.)
- nursing science (post-R.N.)
- nursing adult health (post-R.N.)

**Major 3:** Click "find" to select **find**

I am interested in the colleges that accept a majority of students who apply with an average GPA within the following range:

No preference

I am interested in the colleges that accept a majority of students who apply with an average ACT score within the following range:

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**FAFSA**
**College Finder**

1 - 31 of 31 possible matches.  
 They are listed in order of best match, then alphabetically.

College	Apply	Campus Tour	Add to MyFSA
Charles Stewart Mott Community College (100%)	<a href="#">APP INFO</a>		
Grand Rapids Community College (100%)	<a href="#">APP INFO</a>		
Kellogg Community College (100%)	<a href="#">APP INFO</a>		
Lansing Community College (100%)	<a href="#">APP INFO</a>		
Muskegon Community College (100%)	<a href="#">APP INFO</a>		
<b>Wayne County Community College (100%)</b>	<a href="#">APP INFO</a>		
Alpena Community College (94%)	<a href="#">APP INFO</a>		
Bay de Noc Community College (94%)	<a href="#">APP INFO</a>		
Delta College (94%)	<a href="#">APP INFO</a>		
Glen Oaks Community College (94%)	<a href="#">APP INFO</a>		
Gogebic Community College (94%)	<a href="#">APP INFO</a>		
Henry Ford Community College (94%)	<a href="#">APP INFO</a>		
Jackson Community College (94%)	<a href="#">APP INFO</a>		

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**FAFSA****Wayne County Community College Campus Tour**

Wayne County Community College  
801 West Fort Street  
Detroit, MI 48226-3010 USA

Official telephone: (313) 496-2600  
Fax: (313) 961-2791  
Website: [www.wccc.edu/](http://www.wccc.edu/)

[Add School's Website to MyFSA Bookmarks](#)

*Current as of: July 2003*

**CAMPUS HIGHLIGHTS**

Function type of the institution:

**two-year  
college**

Main student body:

**coeducational**

Academic calendar:

**semesters**

[See more in Campus Highlights >>>](#)

**ADMISSIONS**

Total number of freshman applicants admitted:

**8,265**

[See more in Admissions >>>](#)

**ACADEMICS**

Total number of undergraduate and graduate faculty:

**400**

**Campus Tour Links**

key facts

[campus highlights](#)  
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APP INFO

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## MyFSA Colleges

These are colleges in which you have shown interest by adding them to MyFSA from any of your search results. From this screen you can go directly to that college's admission application or campus tour. If you change your mind or interest in a particular college, you may also delete it from MyFSA. To add a new school, go to the [College Finder](#) section.

College	Apply	Campus Tour	Remove
Wayne County Community College	<a href="#">APP INFO</a>		

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The NEW  
Wayne County  
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- CURRENT STUDENTS
- COURSE SCHEDULE
- CAMPUS INFORMATION
- ADMISSIONS & REGISTRATION**
- FINANCIAL AID
- WORKFORCE DEVELOPMENT & CONTINUING EDUCATION

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**ADMISSION APPLICATION 2004 - 2005**

1	Personal Information
2	Enrollment Information
3	High School Information
4	College Information
5	Test Info/Honors
6	Family Information
7	Activities/Work Experience
8	Essays

✓ = completed and saved  
... = current page =

**SKIP & JUMP to:**

Screen 1

**Introduction**

**SAVE**

# WAKE FOREST UNIVERSITY

## PERSONAL INFORMATION

### Legal Name

First name:

Middle name:

Last name:

Suffix:  Jr., etc.

Prefer to be called:

### Permanent Home Address

Street:

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## Data Transfer Form

### Name

Last name: First name: Middle initial: 

### Contact Information

**Permanent address:** (Only use letters (A-Z), numbers (0-9), periods (.), commas (,), apostrophes ('), dashes (-), number symbols (#), at symbols (@), percent symbols (%), ampersands (&), slashes (/), or blanks (spaces). No other characters are allowed. Use street address abbreviations such as APT (apartment) or AVE (avenue) if the address extends beyond the space provided.)

Street: City (and Country if not in U.S.): State: Zip code: Permanent telephone number:





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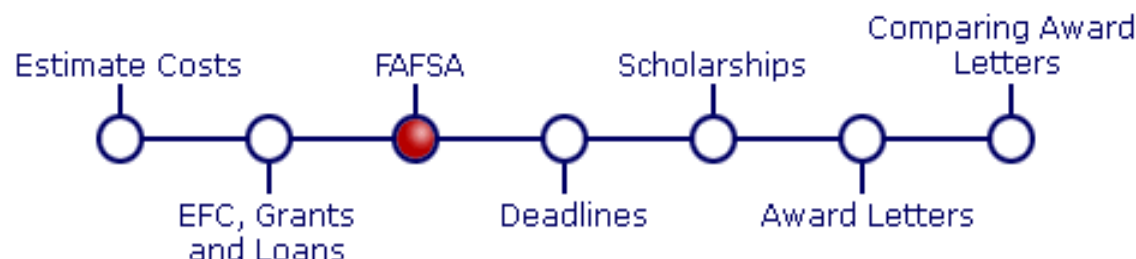
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FAFSA

## Financial Aid Wizard



Complete the Free Application for Federal Student Aid (FAFSA) in order to qualify for aid through the federal government.

- FAFSA forms should be available in your guidance office by late fall.
- You can file the FAFSA anytime after January 1 of the year you will enter college, but we recommend you file it no later than February 15 (remember, using estimated income figures is OK).
- Want to do it now?
  1. Take me to the [FAFSA on the Web transfer form](#) where MyFSA data will be transferred to and automatically fill approximately one third of the Department of Education's FAFSA on the Web. Then return me to FSA Students Portal.
  2. Take me to [www.fafsa.ed.gov](http://www.fafsa.ed.gov) where I will enter my data manually.
- Be sure all the required signatures accompany the application.



## Related Information

[Why should I file FAFSA?](#)  
[What happens after I file the FAFSA?](#)

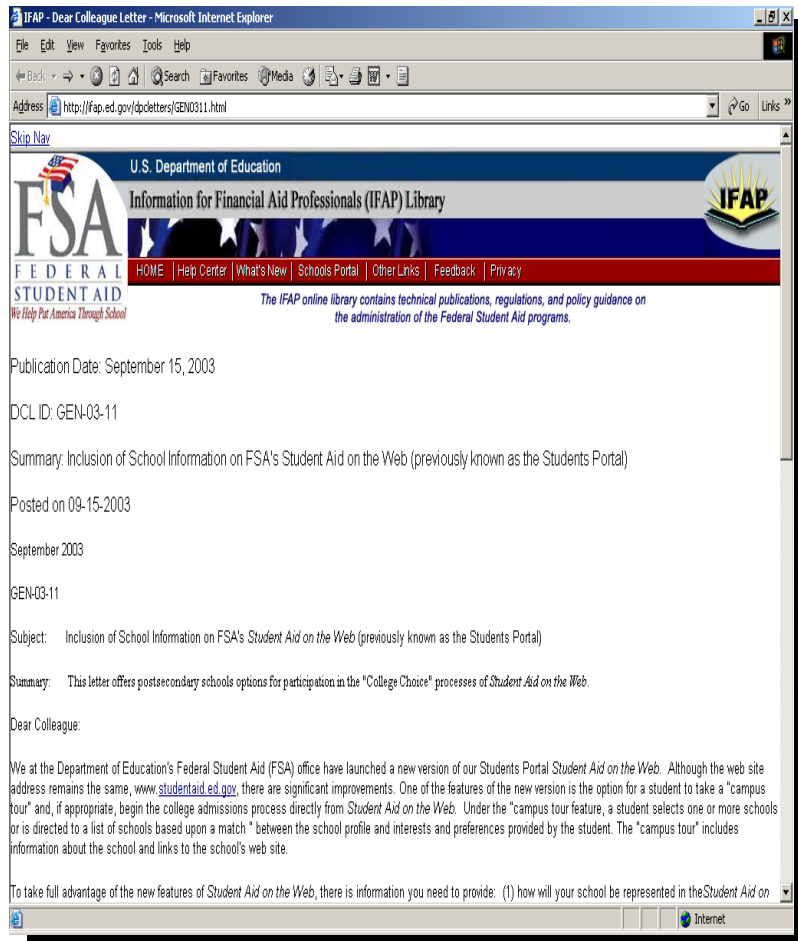
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# Dear Colleague Letter

## GEN-03-11



**Inclusion of School  
Information on FSA's  
Student Aid on the Web**

**Publication Date  
September 15, 2003**



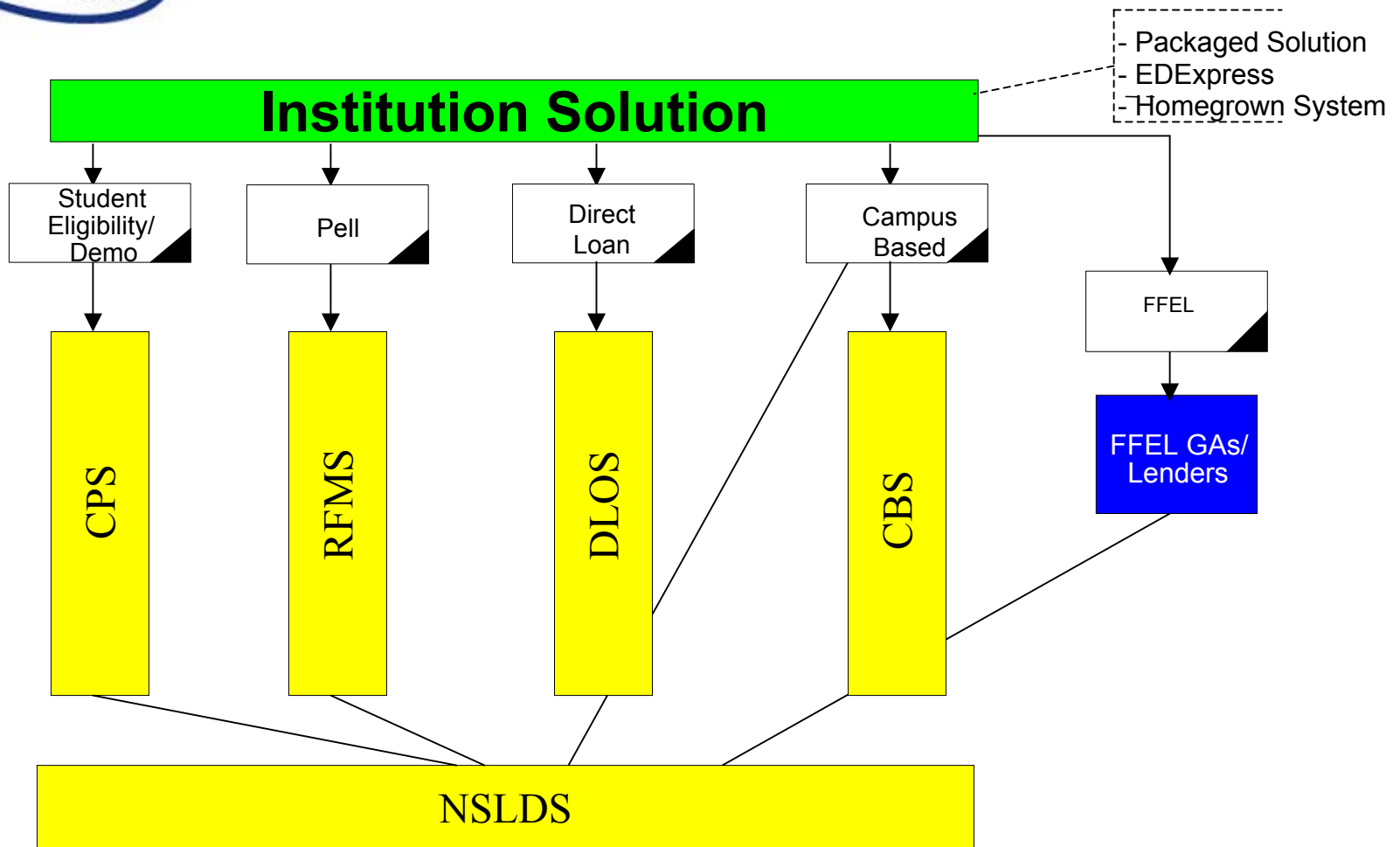
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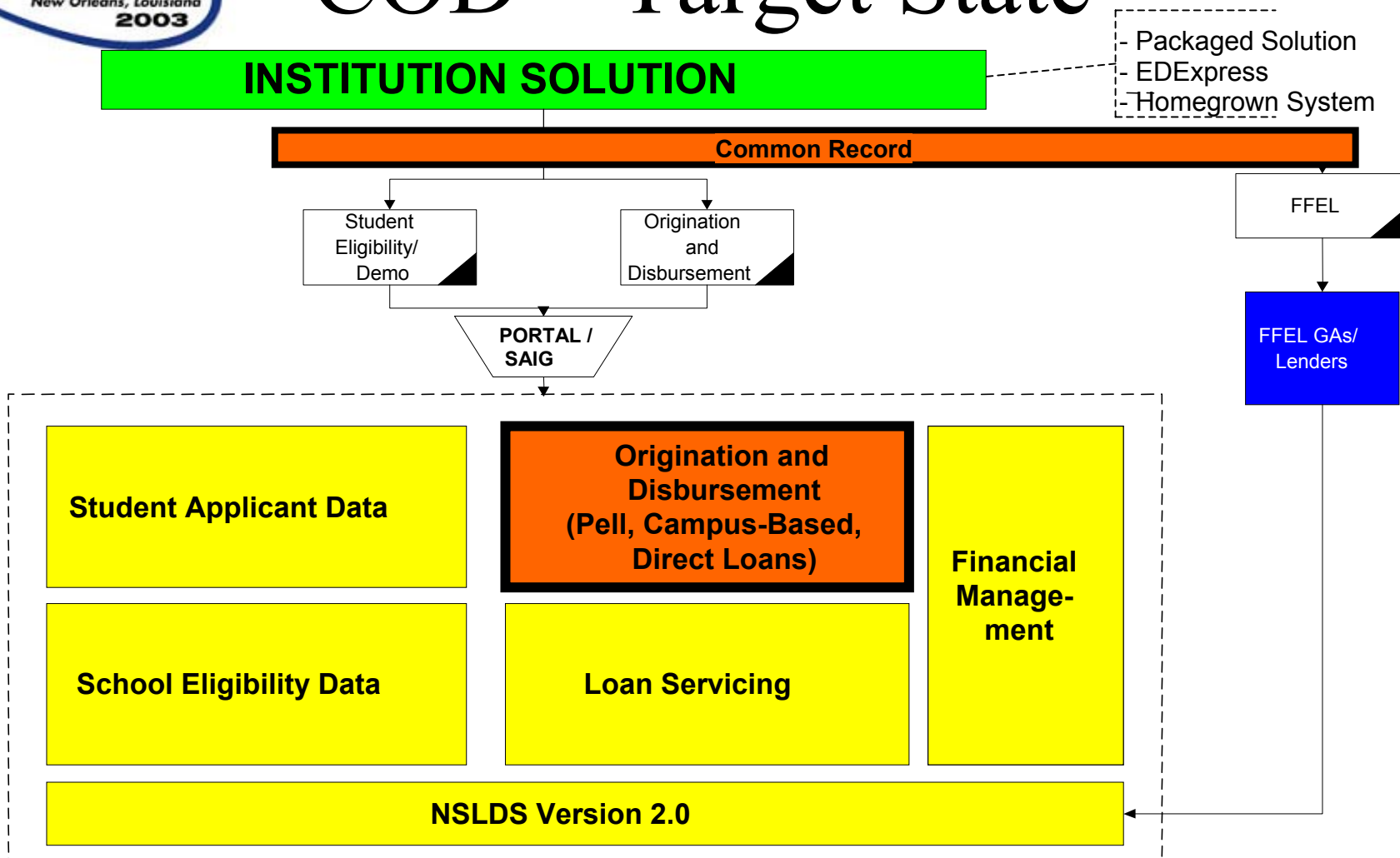
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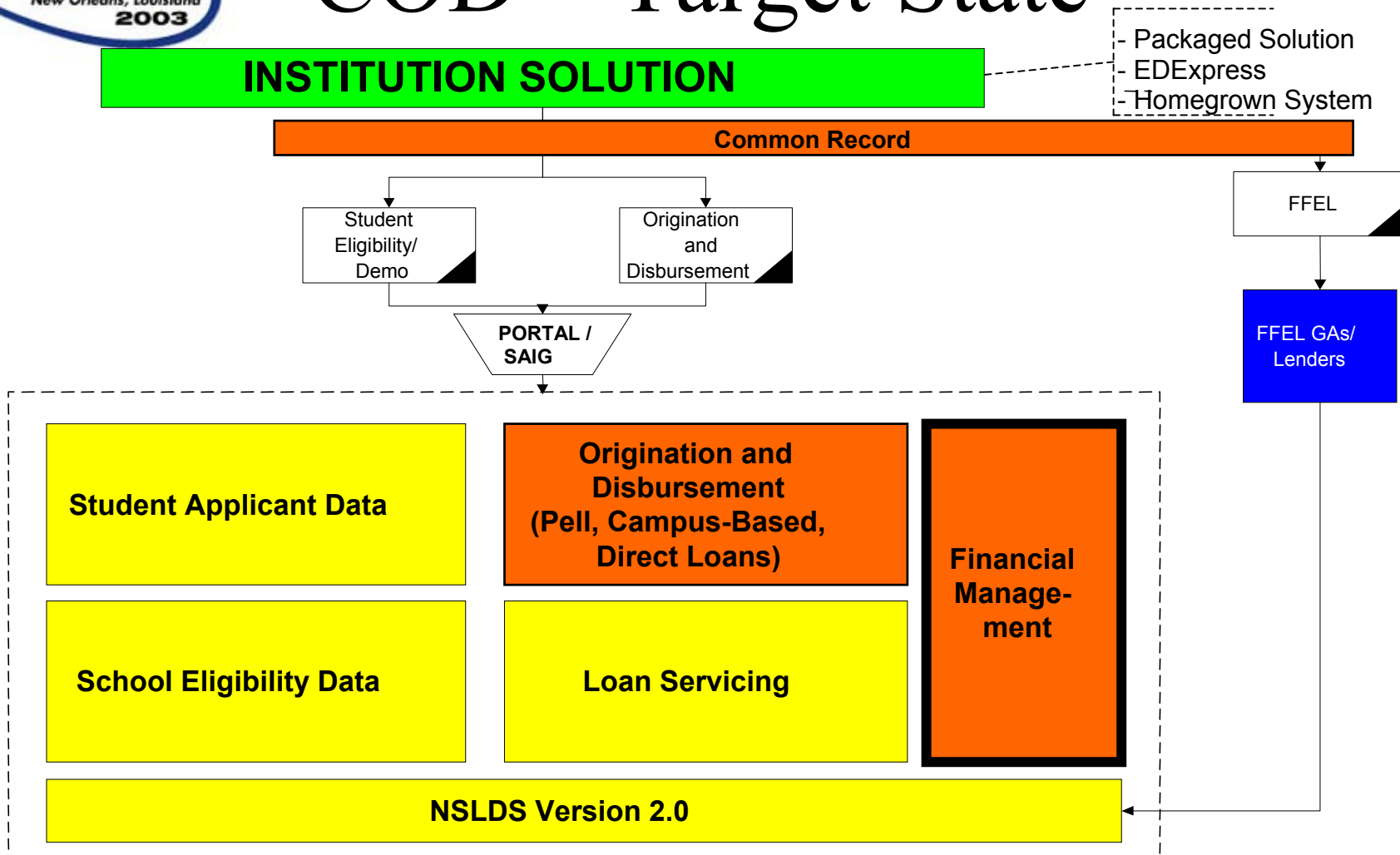
# Prior State



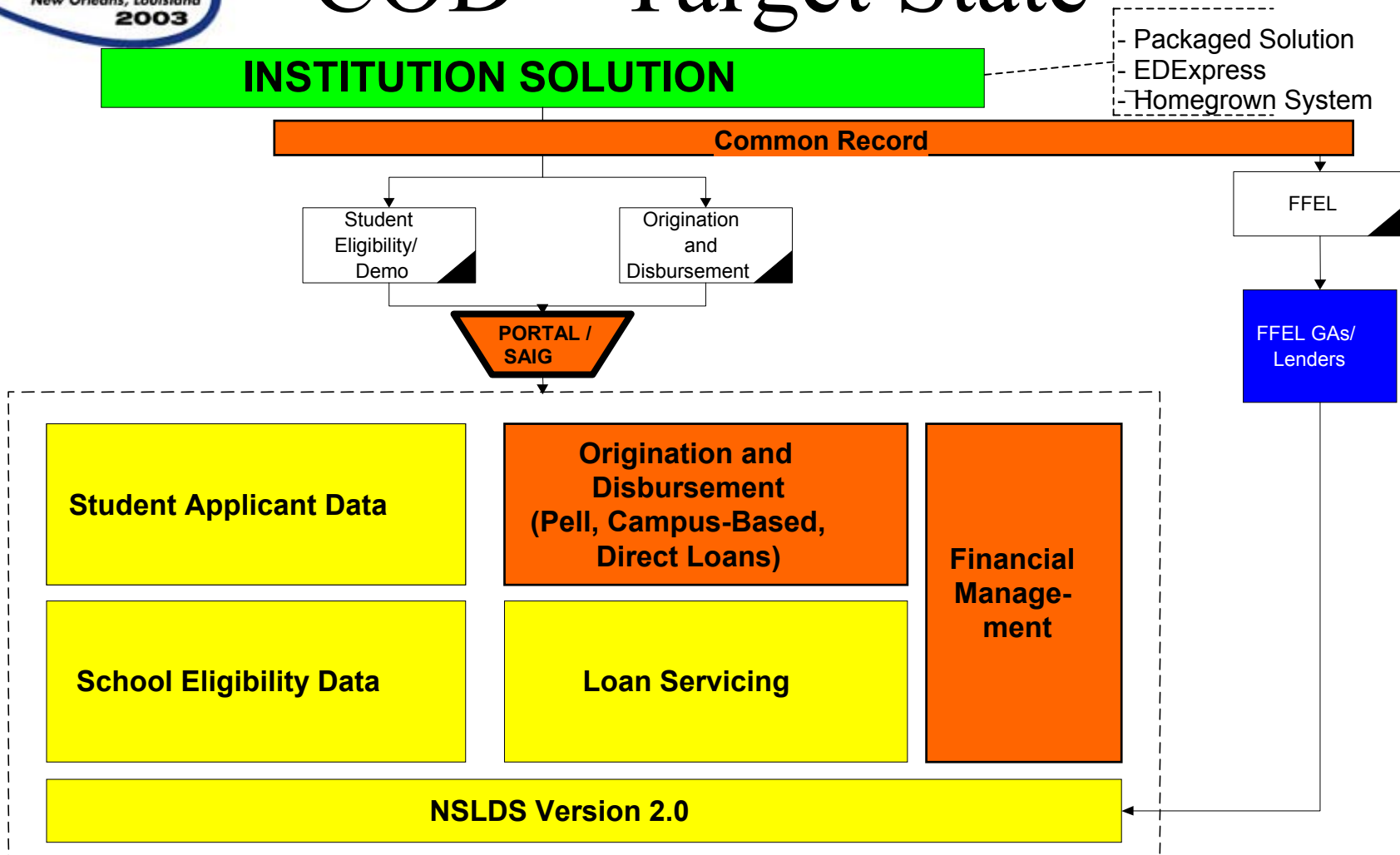
# COD – Target State



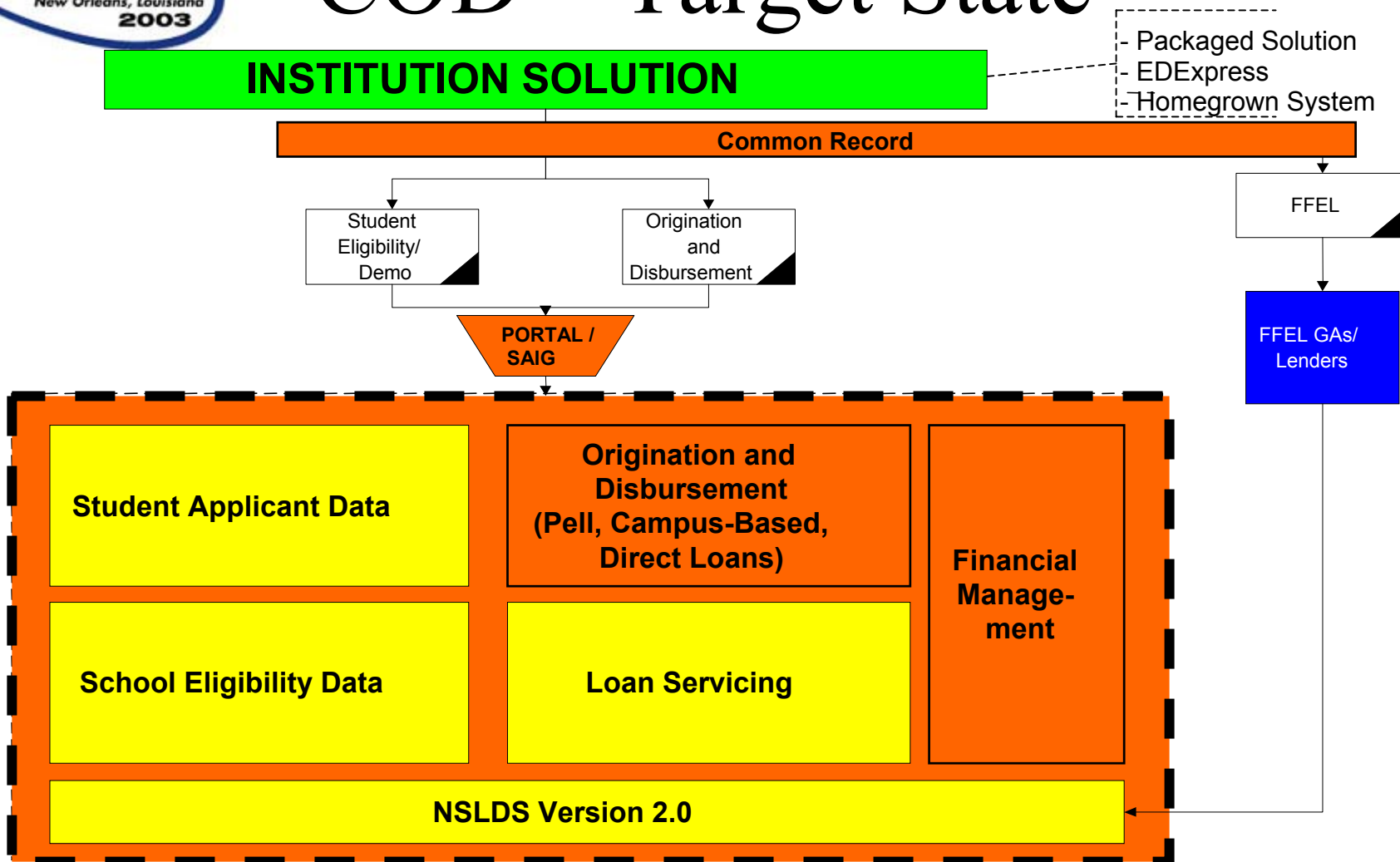
# COD – Target State



# COD – Target State



# COD – Target State





# COD Successes

- Since launch in April 2002:
  - 1.3 million batches with 47.4 million records
  - \$26.5 billion grants and \$22.5 billion originated
  - \$15.6 billion in grants, \$15.5 billion in loans disbursed
  - 532,000 eMPNs (44%)
- Decreased average processing time from days to minutes



# COD Successes

## Program Integrity

- CPS/ DL match
- 99.9% of funds drawn substantiated by schools

## Integrated

- Common business processes for Pell and Direct Loan
- Single customer service call center
- Integrated data views
  - School
  - Student
  - Program
- Middleware enabled interfaces



# COD Successes

## Simplified

- Flexibility and choices in record processing
- Industry standards for XML data exchange
- Reduced
  - Records from 15 to 1
  - Data elements reported from 643 to 135
  - Edits from 274 to 120
- Implemented Common Record compatible EDExpress software



# Common Record Estimated Implementation Schedule



<b>02-03</b>	<b>Common Record – COD v 1.0g</b>	
<b>03-04</b>	<b>Common Record – COD 2.0c (changed all tag names)</b>	
<b>04-05</b>	<b>Common Record – COD 2.0d (+2 new tags – 6 old tags)</b>	
<b>05-06</b>	<b>Common Record – ISIR 1.0a Align with standard</b>	<b>Common Record – COD 3.0 Align with standard (XML Required)</b>
<b>06-07</b>	<b>Common Record – ISIR 1.0a (XML Required)</b>	<b>Common Record – COD 3.0a</b>
<b>07-08</b>	<b>Common Record – ISIR 1.0a</b>	<b>Common Record – COD 3.0b</b>



# POP Process

## What is POP?

- Pell Overpayment Project
- More than one schools reporting Pell disbursement for a student in a given award year
- Total Pell paid exceeds student's annual eligibility

# POP Process

## Why New POP Process?

- School Feedback
  - Complaints indicated improvements were needed
- Non responsive schools won
- Restricted flow of funds
- Processes needed to provide:
  - Early warning on unofficial withdrawals




# POP Process



<b>OLD</b>	 <b>NEW</b>
<p>Pell did not allow overawards for any period of time</p>	<p>Overawards allowed to exist for 30 days</p>
<p>Required submission of a negative disbursement from ineligible school first and then a positive disbursement from the eligible school</p>	<p>If after 30 days the situation has not been remedied, all schools involved will receive a negative disbursement. Eligible school can submit a positive disbursement at any time</p>

# POP Process

## Students in POP\*

 POP	2001-2002	2002-2003
Blocked At One Time	88,890	22,572
Resolved	48,020	22,083
Still in Conflict	25,645	489

\* As of October 2003



# **Campus-Based Calendar**

## **2004 – 2005 Award Year**

**FISAP & Combined Certification Due      October 1, 2003**

**FISAP Edit Corrections Due**

**December 15, 2003**

**Tentative Awards Posted**

**February 1, 2004**

**Final Awards Issued**

**April 1, 2004**



# Agenda

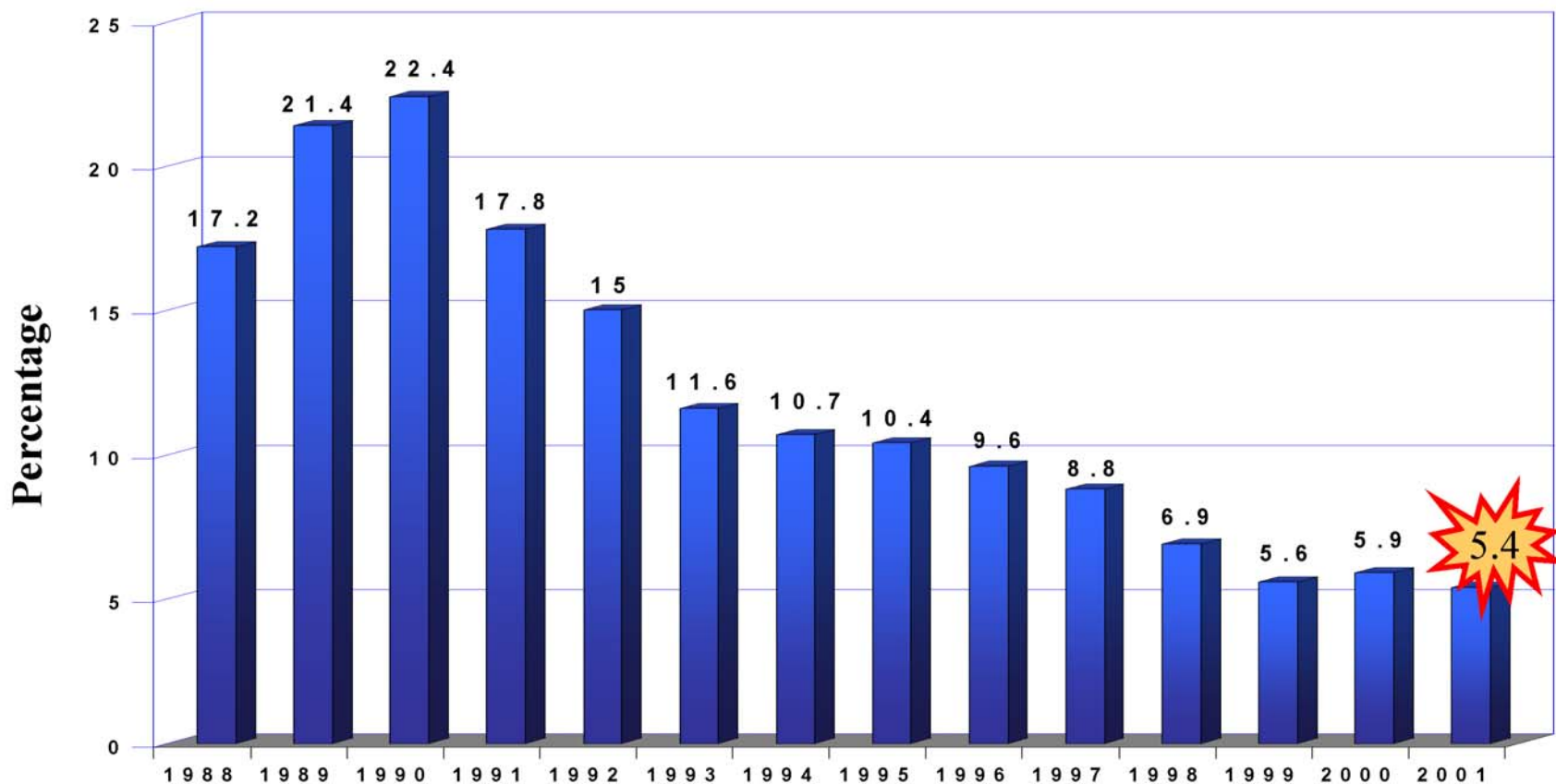
## *EAC Federal Update*

- Welcome and Introduction
- Getting Aid Right at Point of Application
- Getting Aid Right – Origination, Disbursement and Reporting
- **Getting Aid Right - Legal and Policy Issues**
- Things to Remember



# National Student Loan Default Rates

Issued date:	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
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# Title IV Program Budgets

Program	FY 2002 (AY 02-03)	FY 2003 (AY 03-04)	FY 2004* (AY 04-05)
<b>Pell Grant</b> (Max Award)	\$ 11,314,000,000 \$4,000	\$ 11,364,646,000 \$4,050	\$ 12,006,738,000 \$4,050
<b>FSEOG</b>	\$ 725,000,000	\$ 760,028,000	\$ 770,455,000
<b>FWS</b>	\$ 1,011,000,000	\$ 1,004,428,000	\$ 998,502,000
<b>Perkins</b> (Cancellations)	\$ 100,000,000 67,500,000	\$ 99,350,000 67,061,000	\$ 98,764,000 66,665,000
<b>LEAP</b>	\$ 67,000,000	\$ 66,565,000	\$ 66,172,000

\* Conference Report (H. Rept. 108-401), 11/25/2003



# **IRS Data Match - Status**

- **President's Management Agenda**
- **ED's Blueprint for Management Excellence**
- **Current HEA Authority Inadequate**
- **ED/Treasury/OMB Legislative Proposal to Amend Internal Revenue Code--August 2002**
- **On-going Discussion with Congressional Committees**
- **Early Internal Discussions on Implementation**



# Upcoming Policy Letters

- *Use of Electronics*
- *Return of Title IV Aid*
- *Disaster Relief*



# Agenda

## *EAC Federal Update*

- Welcome and Introduction
- Getting Aid Right at Point of Application
- Getting Aid Right – Origination, Disbursement and Reporting
- Getting Aid Right - Legal and Policy Issues
- **Things to Remember**



# **Things to Remember**

## ***Recent Letters***

- **GEN-03-12 (Oct)    NSLDS Aggregate Calculation**
- **GEN-03-11 (Sep)    Student Aid on the Web**
- **GEN-03-10 (Aug)    Foreign Schools**
- **GEN-03-09 (Jul)    XML Transition**
- **GEN-03-08 (Jul)    Long-Term Debt**
- **GEN-03-07 (May)    Dependency Overrides**



# IRS Implementation



# Things to Remember

- **NSLDS Transfer Monitoring**
- **NSLDS Enrollment Reporting**
- **Pell Reporting**
- **Return of Title IV Aid Transactions**
- **Release of Credit Balances**
- **Use of eNotes**